



Iowa Retirement Investors' Club (RIC)  
457/401a Plans  
Look forward to retirement!

## City of Colo RIC Account Form



### Personal Information

Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
Last First MI Existing accounts use last 4 digits only  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Birth Date \_\_\_\_\_ Phone (work) \_\_\_\_\_ Phone (home) \_\_\_\_\_

### 457 Payroll Deduction Election

Changes affect the 1<sup>st</sup> available check of the month following receipt of this form unless a later date is indicated. Stop requests are immediate.

The combined amount of all 457 pretax and Roth contributions in a tax year is limited to the IRS annually declared maximum contribution limits (see <https://das.iowa.gov/RIC/PSE/contributions>).

<b>Deduction amount</b>	<b>Mass Mutual</b>		
	Pretax \$ _____	Roth \$ _____	<input type="checkbox"/> Stop deductions
<b>Deduction frequency</b> (select one)	<input type="checkbox"/> 12 checks/year	<input type="checkbox"/> 1 <sup>st</sup> check or <input type="checkbox"/> 2 <sup>nd</sup> check	<b>Alternative effective date</b> (if desired)
	<input type="checkbox"/> 24 checks/year	<input type="checkbox"/> 26 checks/year (all checks)	
			<input type="checkbox"/> Begin as of _____
			<input type="checkbox"/> 1 check only _____
			<input type="checkbox"/> Final check _____

### Participant Signature

I authorize my employer to process these requests. I have access and agree to the terms and conditions of the Iowa Retirement Investors' Club (RIC) as disclosed in the Plan Document. I have established 457 and 401a accounts with a RIC provider. I understand that the total of all 457 contributions made in the calendar year must not exceed the federal limits as required by the Internal Revenue Code section 457. I understand that withdrawals may only be made upon termination of employment or qualification for an in-service distribution.

X \_\_\_\_\_  
Participant Signature Date

### Form Submission

**New accounts:** Provider account forms: Forward to the provider  
RIC Account Form: Forward to your payroll office (shown below)

**Existing account changes:** RIC Account Form: Forward to your payroll office (shown below)

### Agent Use Only (Not required for existing accounts or electronic enrollment if available)

I am authorized to open accounts for this employee and verify that the participant has established 457/401a accounts with the provider shown below.

Print Agent Name \_\_\_\_\_ Agent Signature \_\_\_\_\_ Agent Phone Number \_\_\_\_\_ Provider Name \_\_\_\_\_ Date \_\_\_\_\_

Received by RIC	Payroll Office	RIC Use Only
	Date Received: _____	Date Pended: _____
	Paycheck Effective Date: _____	Entered: _____
	Name: _____	Checked: _____



Visit the RIC website at <https://das.iowa.gov/RIC> and click on the Public Employees portal to access the RIC At-A-Glance (from Your Plan Details), IRS maximum contribution limits, and other plan options specific to your employer's 457/401a plans.

